

***Juvenile Delinquent Information System***

**JUDI**

**User Guide**

Version 1.2.1

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West Virginia Court Improvement Program Oversight Board

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## **I. INTRODUCTION**

### **A. About JUDI**

The **Juvenile Delinquent Information System**, JUDI, has been developed by the West Virginia Department of Health and Human Resources. The principal objective of the system is to facilitate and expedite the drafting of court orders in juvenile delinquency cases, focusing on the vital need to provide the appropriate Title IV-E findings in removal orders.

JUDI operates in PC/Windows environment.

### **B. Why Use JUDI**

The JUDI software offers the following advantages:

- It is user friendly
- Case and party information needs to be entered only once
- Orders can be generated in the courtroom
- Form language meets statutory and rule requirements
- Forms may contain stock and custom language
- Forms act as checklists for the various types of hearings
- Helps track orders
- Generates case summary sheets

### **C. Installation Process**

The installation process takes one to two minutes and automatically creates an icon for your computer, so that JUDI can be accessed from your desktop.

#### **To install JUDI:**

##### **a. From Installation CD**

1. Shut down any active Windows applications;
2. Insert the installation disk into the CD-ROM drive of your computer;
3. Follow on-screen instructions.

##### **b. From Download**

1. Click on link to JUDI installer;
2. Select "Save";
3. Select destination for saved installation file;
4. When download is complete, click "Run";
5. Follow on-screen instructions.



## **II. BEGINNING ESSENTIALS**

## A. Main Menu

To access JUDI after the initial installation, click on the JUDI icon on your desktop, which will open the program and display the Main Menu screen - Figure 1.



Figure 1

**User Tip:** To “zoom in” on the screen so that the text and objects are larger, click on the button shown here,  which is located on the extreme lower left corner of the screen. To “zoom out” on the screen, click on .

There are eight options on the Main Menu. Under **Cases** the four choices are: *List*, *Find*, *Add New*, and *Checklists*, and under **Utilities** the four choices are: *Professionals*, *Settings*, *Library*, and *About JUDI*.

### 1. Cases

*List* – Display a list of all cases and open any specific case.

*Find* – Find specific cases meeting selected search criteria.

*Add New* – Create a new case.

*Checklists* – View and print a checklist for each of the orders to be created.

## 2. Utilities

*Professionals* – Enter and edit information regarding the professionals associated with abuse and neglect cases in your circuit.

*Settings* – Choose default identifiers for all forms generated by JUDI, such as "Juvenile Case No."

*Library* – Enter and retrieve custom phrases and paragraphs you frequently use in orders.

*About JUDI* – JUDI license information.

**Note:** To return to the Main Menu from any screen, click the *Main* or *Main Menu* button.

### B. Starting Up

Before entering case data and generating forms, start with information global to all cases which needs to be entered only once, such as professionals and settings preferences. You may also want to add any custom library text that you anticipate using in orders on a regular basis.

## 1. Professionals

Before adding a new case, enter data for all known professionals involved in the case. You can do this at any time, but it is easiest to have the professionals data entered **before** you add a new case. All information entered in the professionals database will be stored for retrieval and use in any case. To view the professionals database, click the *Professionals* button on the Main Menu. The system displays the screen pictured in Figure 2.

Name	Type	Phone	County	ID	Delete
Bozo, Bill	Attorney			1287	•
Buckman, Bill	Juvenile Officer	304-258-2255		1273	•
Capulet, Carl	Attorney			1259	•
Conley, Pete	Attorney		Harrison	1052	•
Edwards, Tommy	Attorney			1255	•
Fowler, Frank	Attorney			101	•
Gerner, Joe	Attorney			1250	•
Gordon, Margaret	Attorney	258-5555	Morgan	1055	•
Gumshoe, Joe	Attorney			1288	•
Guttatonia, Gus	Attorney			1281	•
Hammer, Mark	Attorney			1281	•
Harnesey, Henry	Attorney			1256	•
Hedges, John	Attorney	304-568-9987		1051	•
Hilbert, Dave	Prosecutor	263-5555	Berkeley	1054	•
Holbrook, Pete	BCSE		Kanawha	1272	•
Janowicz, Joseph	DHHR			1268	•
Knox, Keith	Assistant Prosecutor	366-6897		1258	•
Mason, Virginia	BCSE		Kanawha	1271	•
Masterson, Margaret	Attorney	304-258-5698	Preston	1063	•
Moorehead, Christopher	Attorney		Morgan	1060	•
Morse, Barry	Attorney			1070	•
Parish, Fred	Attorney	304-565-8989	Preston	1069	•
Sanders, David	Judge		Berkeley	1053	•
Sedgewick, Martin	Attorney	258-5656	Morgan	1059	•
Stevens, Barry	Attorney		Monongalia	1062	•

Figure 2

**User Tip:** At any time, you may enter the information for the professionals (e.g. judges, prosecutors, counsel, etc.) typically involved in juvenile cases in your circuit, which will then be available for selection and use in all cases.

## Adding a Professional

- From the **Professionals** screen, click the *Add* button to display the **Add Professionals** screen (Figure 3).
- Select the type of professional to be added, and click *Add*.
- Continue to enter the pertinent data. Click “Save” to save the data, and you will then be returned to the list of professionals.
- If you wish to add another professional, simply click the *Add* button to begin the process again.
- Professionals may also be added when a new case is being entered into the system.

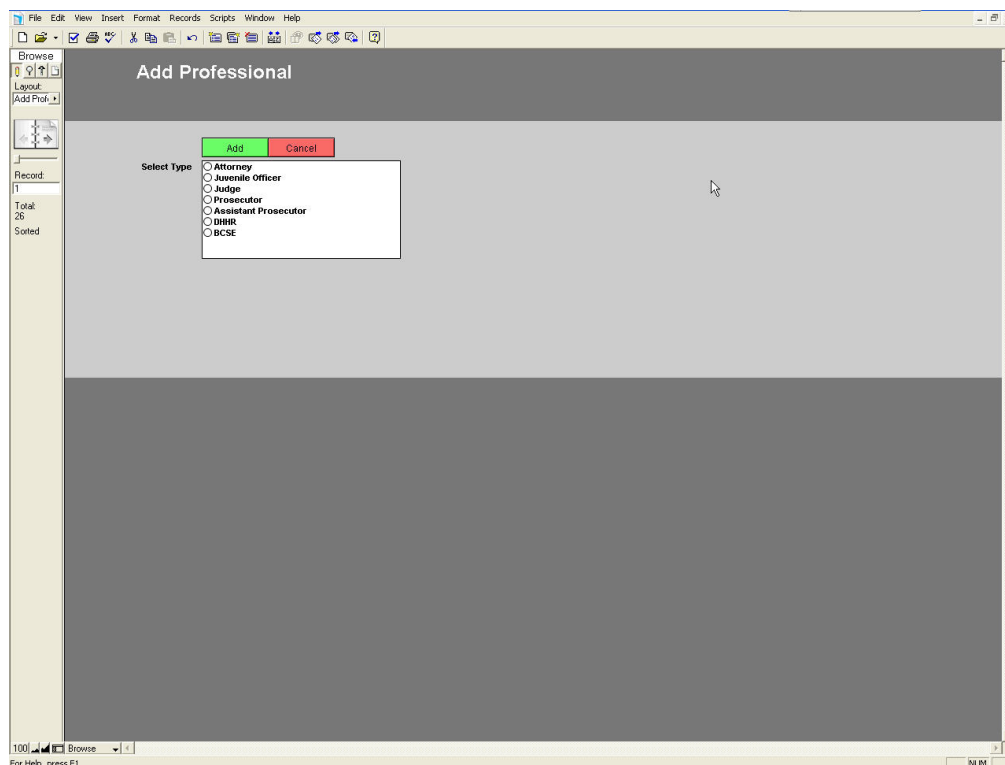


Figure 3

**User Tip:** If orders will be generated for more than one county for a particular judge (in a multi-county circuit), you will need to enter judge information for each county in which that judge presides. Once you have entered the judge's information for one county, click the *Add Judge Location* button on the "Judge" information screen, and add appropriate information for the additional county location.

**User Tip:** The fields on the screen will vary depending on what type of professional you are entering. For example, the Bar Number field will appear for attorneys only.

## Other “Professionals” Screen Options

### Find

To find a specific person such as Judge “John Smith” without looking through the list, click the *Find* button, and enter information to activate the search, such as last or first name. (If the search criteria are not specific enough – for example “John,” the system will display the information for each professional named John found in the database).

### Show All

At some points in the program, you can select to display a list of a particular category of professionals (e.g. Judges). To again display a list of all the professionals already in the system click *Show All*.

### Key People

Clicking this button will take you to the **Key People** screen for the last case you were in.

### View

To see or edit the information regarding a specific professional while in the list, click the *View* button to the left of the name.

### Delete

To delete a person from the list of professionals, click on the red *delete* button to the right of his or her information.

## C. Settings

This menu option is used to set the default terms and headings for the forms you will be generating. Several defaults can be set – *Case Number Label*, *Include Birthdate for Juvenile Respondent*, *Include Adult Respondent Name(s)*, *Include Judge Name*, *Include Judge Division*, *County*, *Judge’s Signature Placement* (left or right side of page), *Remove Page Numbers*, *Include Inspected by List with Orders*, and *Hide “Print” or Rich Text Format (RTF)” Dialogue Box*. (Figure 4)



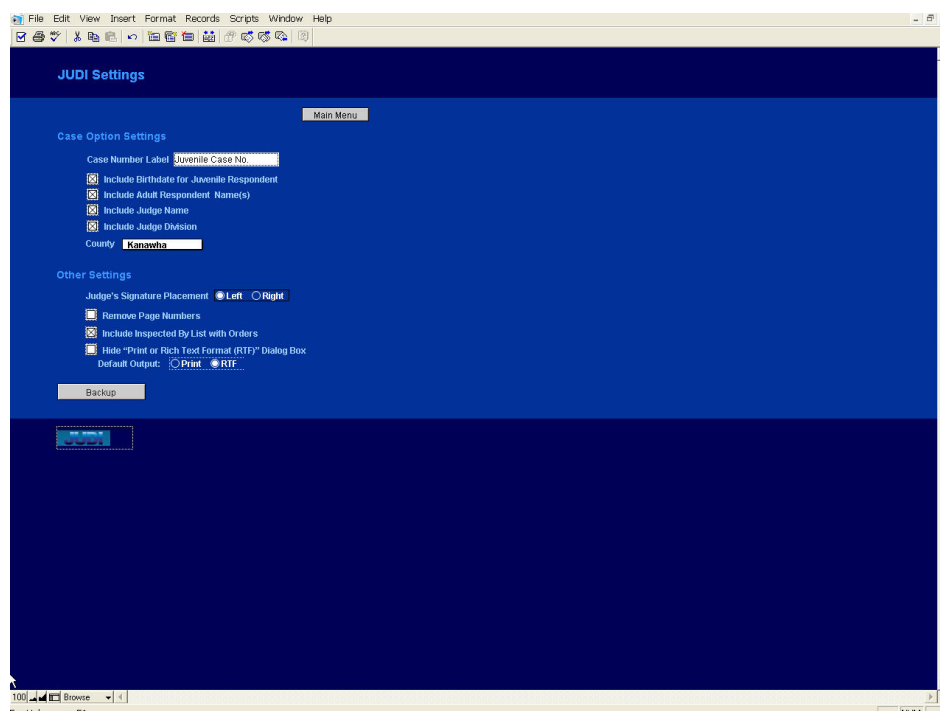


Figure 4

### 1. Case Number Label

This is the heading used to label the case number. "Juvenile Case No." is the default setting. Should you desire to identify your cases by a different label, click on the white *Case Number Label* box and edit the existing label. This label will be the default label unless you return to this screen and change it.

### 2. Include Birthdate for Juvenile Respondent

This setting permits you to show the birth dates of the children on all the forms. The default setting will show the birth date. If you desire to omit this field from the forms, click on the box to remove the "X".

### 3. Include Adult Respondent Name(s)

This setting includes the adult respondents' names in the case caption.

### 4. Include Judge Name

This setting allows you to include the Judge's name in the case caption.

### 5. Include Judge Division

This setting permits you to include the Judge's division identification in the case caption.

## **6. County Selection**

Select the county in which the case is pending.

To edit or add a county:

- Select "Edit" from the drop-down list
- You may then edit (or delete) any county on the list, or beginning on a new line, add another county
- Use the name without "County" (e.g. enter "Hardy" not "Hardy County")
- Click OK
- Click again on the white field under "Select County" and click on the desired county name

## **7. Judge's Signature Placement**

Allows you to determine on which side of the page the Judge's signature line will appear.

## **8. Remove Page Numbers**

This setting will remove the page numbers from the printed order.

**Note: If the “RTF” feature is used to send an Order to Microsoft Word® or Corel WordPerfect®, you must add the page numbers manually.**

## **9. Include Inspected By List with Orders**

This setting will allow you to print an “Inspected By” list with each order you print. If this option is not selected, you may still print the “Inspected By” list for an individual order by checking the “Print Inspected By List” box on the “General” tab of each order.

## **10. Hide “Print or Rich Text Format (RTF)” Dialogue Box**

This box, when selected, allows you to select what happens when “Print” is selected on an Order. If you checked the “Print” radio button in this dialogue box, the Order will be printed from JUDI. If you selected “RTF”, JUDI will automatically create a Word or WordPerfect document.

## **11. Backup**

Use the Backup feature to backup all of the data in JUDI. When you click on the “Backup” button, JUDI will automatically place all of the data files in the “My Documents” folder on your computer. These backup files all have “JUDI” in their name, so make sure they are not deleted from the “My Documents” folder. If you need to restore the data to JUDI and need assistance doing so, feel free to contact Technical Support (See Section VII).

## D. Library

In some cases, you may want to use your own language to supplement or to replace text supplied by JUDI. The “Library” feature allows you to enter and save your own stock phrases and paragraphs. Once entered, these phrases and paragraphs can be retrieved during the process of constructing an order.

### 1. Adding Library Text

To create custom text, click the *Library* button on the Main Menu. This will display the screen shown in Figure 5.

To add and store new text, click *Add* on the **Library** screen. Enter the keyword that will be used to identify the text. Then tab down and enter the text itself in the second box. You may enter as much text as you want.

If the text you wish to add is already part of another document (such as a word processing file), you may automatically enter the text by:

- highlighting the text in the word processing document, right click, and select "copy";
- navigating to the JUDI **Library** screen as described above;
- selecting *Paste from Clipboard* on the screen. The text will then appear in the Library.

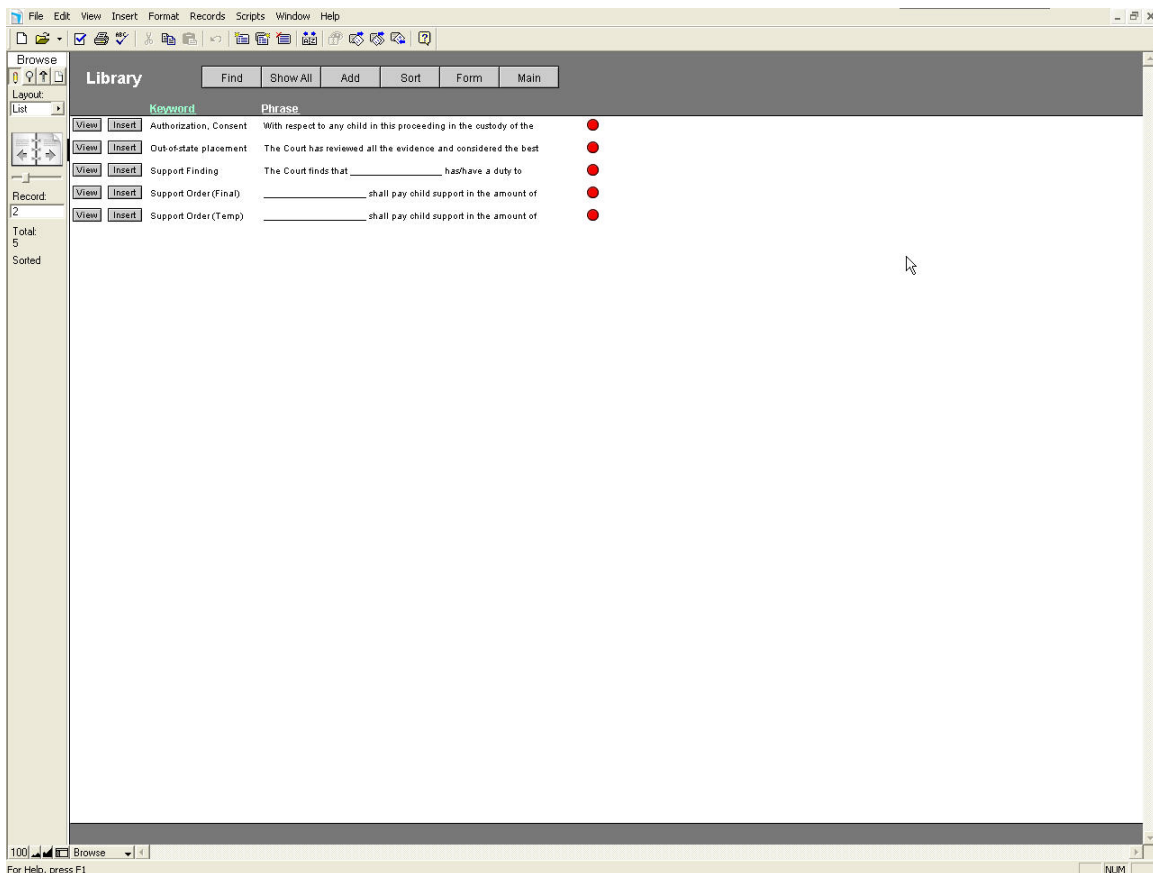


Figure 5

## 2. Other Library Screen Options

### **Find**

Locates specific user-created text. Type in the search word(s), and click the *Continue* button on the left of the screen. If a match is found, the system will display the entire text. (If more than one match is found a list of matching text will be displayed).

### **Show All**

Displays all user-created text in your library database.

### **Sort**

Displays all library text in ascending alphabetical order by keyword/label.

### **Forms**

Shows the list of existing forms for the case you are currently working on.

### **Main**

Displays the Main Menu

## 3. Accessing the Library When in a Form

See Section V.C.5 – “Using Library Text.”

### **E. Checklists**

Forms checklists are accessed by clicking on the “Checklist” button on the Main Menu. These checklists can be filled out during a hearing so that JUDI may be used to prepare the Order. The blanks in the checklists correspond with data screens in JUDI. To print a checklist, double click on the title. Acrobat Reader is required to open the form. If you do not have Acrobat Reader, click on the Acrobat Reader icon in JUDI, and you will be able to access a web page from which it may be downloaded.

## III. STARTING A NEW CASE

### **A. New Case Wizard**

To add a new case:

- Select *Add New* from the Main Menu. JUDI will walk you through the process with the help of the wizard.
- Select the county of jurisdiction.

The wizard will now direct you to input juvenile’s information.

Figure 6 shows “Enter Juvenile” screen.

**Enter Juvenile**    Escape    Previous    Next

Juvenile Case No.

Name First  Last

Address

City  ST  ZIP

County

Phone

Birthdate  Age   
(Enter as MM/DD/YYYY)

Counsel

Sex ☐ Female ☐ Male

Enter address where juvenile resides in county, or in non-resident, county location or address where juvenile was found.

Figure 6

To enter Juvenile information:

- Enter the case number.
- Enter name and address information.
- Enter birthdate.
- Identify the Juvenile's counsel by clicking the counsel box and clicking on the correct name from the displayed list.
- If you need to add an attorney to the Professionals list, you may do so by selecting *Add Attorney*. After the attorney information has been added, select *Back* to return to the wizard.
- Select the Juvenile's counsel by clicking in the "Counsel" box.
- Select the sex of the juvenile.

**When you are finished entering the juvenile information, click the *Next* button.**

Next, the wizard will direct you to enter Adult Respondent information:

To enter Adult Respondent information:

- Select the relationship of the Adult Respondent to the juvenile from the displayed choices; to modify or add a type of Respondent, click "Edit" from the drop-down list.
- Enter name and address information.
- Identify the Respondent's counsel by clicking the counsel box and clicking on the correct name from the displayed list.

- If you need to add an attorney to the Professionals list, you may do so by selection *Add Attorney*. After the attorney information has been added, select *Back* to return to the wizard.
- If you need to enter more than one Respondent, choose from the buttons at the bottom of the screen depending upon whether you will be entering a Respondent with the same address or a different address.
- To review or edit the Respondent data you have entered, click the *List Respondents* button. (To return to the case wizard from the Respondent List, click the *Respondent Entry* button at the top of the screen.)
- To delete a Respondent's information, click the *List Respondents* button, and click the red button next to the entry you would like to delete.

**When you are finished entering all Adult Respondents, click the *Done* button.**

Next, the wizard will ask you to select the professionals for the case by displaying the *Key People* screen - Figure 7.

By clicking the respective *Select* buttons:

- Select the Juvenile Officer.
- Select the Prosecutor or Assistant Prosecutor.
- Select the Judge.
- Professionals may be added to the system by selecting *Add Professionals*.

The screenshot shows the 'Key People' screen for the Circuit Court of Kanawha County. The 'Professionals' tab is selected. The form includes the following elements:

- Navigation:** View Summary, Print Summary, List Cases, List Forms, Main Menu.
- Tabs:** Family, Professionals (active), Agencies.
- Buttons:** Edit Professionals, Remove (for Prob Officer and Prosecutor).
- Fields:**
  - County: Kanawha
  - Date Case Filed: [Calendar icon]
  - Prob Officer: Select
  - Prosecutor: Select
  - Judge: Select
  - Room: [Input field]
  - Division: [Input field]
  - Petitioner Name: [Input field]
  - Relationship: [Input field]
  - Address: [Input field]
  - City: [Input field]
  - County: [Input field]
  - Phone: [Input field]
  - ST: WV
  - ZIP: [Input field]

Figure 7

Next, select the agencies involved in the case by clicking on the "Agencies" tab.

- To select the DHHR representative, click on the *Select* button and select the DHHR representative involved in the case.
- Click on the *Select* button and select the BCSE involved in the case.
- To edit any of these professionals, click the “Edit Professionals” button, edit the professional that needs to be edited.

You have now completed opening a new case. If you wish to immediately proceed with creating a new order in this case, click *List Forms*, then click *Create* in the message window and choose the order and then select the specific form. (See Section V.B. below for general instructions on creating a new form.)

## IV. VIEWING AND MODIFYING CASE INFORMATION

To review or edit case information, click the four different tabs on the **Key People** screen – *Family* (Figure 8), *Professionals*, and *Agencies*. Additional family members involved in the case may be added on the **Key People** screen at any stage.

For example, if after reviewing the information regarding the family by selecting the *Family* tab you realize you forgot to enter an adult related to case, click the *Add New* button to the left of the adult Respondent’s information, and JUDI will display a new screen on which you can enter the additional information.

You may edit information regarding anyone listed on the *Family* tab by clicking the *View/Edit* button beside each name.

You may delete an individual by clicking the red *Delete* button.

Figure 8

The **Key People** screen, in addition to three tabs, has five header buttons:

**View Summary**

Displays a summary page for the case. To return to the *Key People* screen after viewing the summary, click the *Continue* button on the left margin of the screen.

**Print Summary**

Prints the summary page. This will provide a useful summary of key case information.

**List Cases**

Displays all cases currently in JUDI.

**List Forms**

Displays a list of existing orders for the case.

**Main Menu**

Returns you to the main menu.

## **V. WORKING WITH A CASE**

### **A. Selecting a Case**

To locate and access an existing case, from the Main Menu click either *List* or *Find*.

- **List**

Clicking *List* will display all cases in JUDI. Cases may be sorted by the Child's last name, the County, or the Date Filed, by clicking on the button above the desired column. You may view the key people for a particular case by clicking the *Key People* button beside the case. You may also view a list of forms previously created (or create a new one) in a particular case by clicking the *Forms* button beside the case.

- **Find**

To locate and access a specific case in JUDI, click the *Find* button on the Main Menu. Then enter any of the search criteria shown on the screen, such as child's name, case number, or county. You can enter partial information, such as the first three letters of the last name, for example. If the criteria you enter are not specific enough to isolate one case, all qualifying cases will be displayed, and you will be able to select the one you want.

### **B. Creating New Forms**



To create a new form:

- Select the case through the *List* or *Find* option under *Cases* on the Main Menu
- Click the *Forms* button next to the desired case
- Click the *Add Form* button
- Choose the form and click the *Create* button.

**User Tip:** Until you are familiar with the form you are working on, first review all screens, and make liberal use of the *Preview* feature in order to see how the form is organized.

## C. Standard Screen Features

Because each form is different, the process of creating the form itself is unique to each order. However, many features are standard across all forms. Before generating an order, review these common features.

### 1. Common Fields

These fields appear on each form:

- Form title
- Action buttons and/or tabs
- Juvenile's name and case number
- Name of judge
- Screen tabs

### 2. Common Features

- Ability to incorporate stored text in all forms (See section 5 below)
- Ability to check spelling (See section 6 below)
- Ability to print recipient lists (See section 7 below)
- Ability to print signature lines for persons who inspected an Order (See section 8 below)
- Selection of hearing attendees (See section 9 below)

### 3. Text Boxes

- White text boxes (with or without supplied text) can be modified either by typing, or by inserting text from your Library
- Gray text boxes contain text supplied by JUDI that cannot be edited, and serve only as on-screen previews

**User Tip:** In most white text boxes (such as the boxes labeled “Additional Recitals” or “Additional Orders”), any formatting (paragraph indents, etc.) is already provided for the initial paragraph. If additional paragraphs are added to the text boxes, use the “Enter” key to indent. Using the “Tab” key will move the cursor to another box.

- Click the *Edit Title* button at the header portion of the screen

- Enter the new title

## 5. Using Library Text

To add stored text to a text box in a form:

- Place the cursor in the text box at the point where the stored text is to be inserted.
- Click the *Get Text* button adjacent to the white text box. This will display the **Library** screen.
- From the **Library** screen, select the text to be inserted from the list, or click the *Find* button and locate the desired text.
- Click the *Insert* button.
- This places the stored text in the previously selected location. Once this text is entered in the box, it may be edited. Additional library text can also be added to the same box.

## 6. Check Spelling

JUDI will automatically underline, in red, a misspelled word. When this occurs, right-click on the word and select suggested spellings and then select the correct spelling of the word. Alternatively, instead of selecting a word, you may select “spelling” for a more complete list. If you want JUDI to ignore this work and future occurrences of the word, select “Ignore All”.

## 7. Print Recipient List

To print a list of people to whom a copy of the Order should be sent after it is entered, click on the button labeled “Print Recipient List.” The box is located near the top of the first page on all orders. JUDI will print a list of names and addresses of all counsel of record and *pro se* parties. The list may be edited by following the instructions on the screen.

## 8. Print "Inspected By" List with Order

To print signature lines for people to acknowledge that they have inspected the order, click the button labeled "Print Inspected by List with Order."

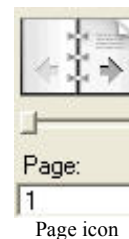
## 9. Attendees Screen

All orders note the appearances of parties and counsel. You **must** note the attendance of parties and counsel by clicking on the *Attendees* button, which is located near the top of the first screen. JUDI will display the **Hearing Attendees** screen on which the appropriate selections should be made. To return to the order screen, click on the *Back* button at the upper right of the screen. If desired, the non-appearance of any party or counsel may be noted in the *Additional Recitals* box just below the *Attendees* button on each order form.

## 10. Previewing Without Printing

To review a form without sending it to the printer:

- Click the *Preview* header button. You will see the preview of the printed form
- Click the *Page* icon in the left margin to scroll through the pages of the form (shown at right)
- Click the *Continue* button to return to the form screen



## 11. Previewing and Printing

To review a form and send it to the printer:

- Click the *Print* header button. You will see a preview of the printed form. To fully preview before printing, click the *Page* icon in the left margin to scroll through the pages of the form
- Click the *Continue* button to bring up your printer dialogue box
- If you are ready to print, click *OK*; otherwise, click *Cancel* to return to the form screen
- If you have selected *Print Recipient List With Order*, a second print dialogue box will appear. Click *OK* to continue.

## 12. Converting to a Microsoft Word® or Corel Word Perfect® document

To save a JUDI order as a Microsoft Word® or Word Perfect® document:

1. Click on the “Print” button while viewing the Order you desire to save;
2. Click the “RTF” button;
3. Name the document in the box labeled “File Name.” For Microsoft Word ® documents, add the extension “.doc”; for Word Perfect® documents, add the extension “.wpd”;
4. Select the folder in which you want to save the file;
5. Click “Save.”

**User Tip:** If you want to immediately open the file in Word or Word Perfect, check the box labeled “Automatically Open File.”

## VI. TECHNICAL SUPPORT

For technical support, visit our website at [www.wyjudi.com](http://www.wyjudi.com). Also, you may call or e-mail Pete Conley at [Conley@lawtechllc.com](mailto:Conley@lawtechllc.com); (304) 624-6391, or John Hedges at [john@byrnehedges.com](mailto:john@byrnehedges.com); (304) 296-0123.